



MEMORANDUM
ADMINISTRATIVE SERVICES
PROCUREMENT SERVICES
County of Placer

TO: Board of Supervisors
FROM: Brett Wood, Purchasing Manager
SUBJECT: InTelegy Workload Management Tool – InTelegy Corporation

ACTION REQUESTED

Approve a contract with InTelegy Corporation of Danville, CA for an updated task management software program in the maximum amount of \$375,000. Funding is provided by the Department of Health and Human Services' FY 2015-16 Final Budget and will be included in the FY 2016-17 Requested Budget, resulting in no new net County cost; and

Authorize the Purchasing Manager to sign all required documents.

BACKGROUND

The Department of Health and Human Services (HHS) provides eligibility determinations for financial, medical/health, housing, food or other temporary public assistance services as well as employment services such as job search skills and counseling. On any given day, HHS ensures that over 78,000 Placer County adults and children have a place to call home, have nutritious food on their table and have access to healthcare. The services provided can be life-saving; therefore, the ability to respond immediately to client needs is paramount.

In August 2011, HHS implemented a customized task management tool developed by Solano County to effectively migrate from a case management service delivery model to a task management-service center solution model. This task management tool dramatically enhanced the delivery of public assistance services to Placer County residents and is comprised of a state of the art call center, a document imaging system, online application services, enhanced lobby management tools and a task management application.

Business process management technology is an essential tool necessary to meet the ongoing demand for public assistance service delivery to Placer County residents. On average, with the current task management tool, 53,600 client case tasks are being completed successfully per month. These tasks include new applications, changes to family composition, annual renewals and address changes. However, the current task management tool requires two (2) to three (3) full-time staff just to manage the tool and to manually assign tasks to workers. The present system is unable to support additional requirements which include the following:

- Increased automation of task assignment by the system;
- Increased efficiency in the way tasks are delivered to assigned staff;
- The ability to change system rules to conform to complex business process changes; and
- The ability to produce enhanced reporting metrics.

InTelegy Corporation (InTelegy) has over 18 years of experience working with other County Health and Human Services agencies, establishing call centers and full service centers. Placer County contracted with InTelegy in 2011 to implement its call center and task management software product. Most recently, InTelegy has successfully launched its product, Workload Management Tool (WMT), in Contra Costa County and will be working with Tulare County in the near future.

InTelegy's proposal is being recommended based on an existing California Multiple Award Schedule (CMAS) contract. In accordance with Purchasing Policy Manual Section 1.3(e)(3), a purchase made

against another public agency's competitively awarded contract is exempt from the normal competitive bidding process. InTelegy's CMAS contract meets this criterion.

Therefore, your Board's approval is required in order to proceed with the acquisition and implementation of the WMT product.

FISCAL IMPACT

The Department of Health and Human Services has budgeted appropriately for this purchase and funding is provided by the department's FY 2015-16 Final Budget and will be included in the FY 2016-17 Requested Budget.

cc: Jeff Brown, Director of Health and Human Services
Linda Patterson, Client Services Program Director
Rebecca Mellott, Client Services Program Director
Logan Pratt, Client Services Program Manager